Los Angeles County
Department of Public and Social Services (DPSS)

**LosAngeles
Eligibility, Automated Determination,
Evaluation and Reporting System**

"LEADER System"

Project Management Procedures (PMP)

Deliverable Standards Manual (DSM)

A master plan to define the strategy, deliverables, organization,
plans, processes and procedures for the LEADER project.

PUBLICATION REVISION SECTION

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                            LEADER Project
                            Deliverable Standards Manual (DSM)

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DSM002	TOC	Table of Contents	TOC	April 18, 1996	S. MoIf
DSM002	3	Subtask 2.1 Validate LEADER Functional & Technical Requirements	Approved DSM Update	April 18, 1996	S. MoIf
DSM002	4	Subtask 2.2 Define General Leader Design	Created Section	April 18, 1996	S. MoIf
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DSM002	6	Subtask 2.4 Code and Unit Test LEADER	Created Section	April 18, 1996	S. MoIf
DSM002	7	Subtask 2.5 Conduct LEADER System Test	Created Section	April 18, 1996	S. MoIf
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DSM004	4	Subdeliverable 2.2.5 Security Requirements Template	Approved DSM update	August 30, 1996	C.
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DSM006	5	Subtask 2.3	Approved DSM update	April 2, 1997	J. Gibson
DSM006	6	Subtask 2.4	Approved DSM update	April 2, 1997	J. Gibson
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DSM007	Preface	Preface		November 18, 1997	A. Roth
DSM007	TOC	Table of Contents		November 18, 1997	A. Roth
DSM007	7	Subtask 2.5 Conduct LEADER System Test	Approved DSM update	November 18, 1997	A. Roth

Preface

The Unisys Project Management Procedures (PMP) are a set of project management and procedures volumes that the LEADER project team will use to help ensure the timely transfer, modification, and implementation of the LEADER system and set the standard for high quality project deliverables. The four volumes of the PMP will provide guidance to the LEADER project team in formulating project plans, establishing expectations and managing scope, providing guidance to the project team on project management tools and techniques for managing the project, establishing the standards for development, and defining the quality baseline for project deliverables.

The PMP will provide the management framework for the LEADER project. As with any project of this size and complexity, the initial PMP will be developed as the processes, procedures and standards are defined and will be continually refined and enhanced as the project progresses. These volumes are intended to provide the requirements for LEADER project management procedures, define the requirements for each phase of the LEADER System Development Life Cycle, and establish a framework for each deliverable and their associated standards.

Organization of the PMP

The PMP will consist of the following four volumes:

PMP Volume 1 - Project Control Document

PMP Volume 2 - Project Management Manual

PMP Volume 3 - LEADER Development Standards

PMP Volume 4 - LEADER Deliverable Standards Manual

Each volume will be organized into sections presenting narrative, graphical, and tabular information in a standard format. Volume, section and subsection titles within each

volume are in bold type, vary in font styles and underline, and are denoted, respectively by numbers. Each page includes a standard header that lists the project name, document name, and release number. The footer also includes the name of the volume and section. As updates to the PMP are issued, the headers and footers provide an easy way to identify the sections to be inserted and/or revised.

Each volume of the PMP includes a table of contents located at the beginning of the volume. Each entry in the table of contents corresponds with the bold-typed sections and subsections within each section. Each section is separated by tabs that list the section number and title.

Contents of the PMP

Volume I, *Project Control Document (PCD),* includes a discussion of the project background, goals, overview, project organization, schedules, milestones and project updates. It also includes a description of each of the currently defined LEADER Tasks, the Facility Maintenance and Operations deliverables, and the Maintenance and Enhancement deliverables for the LEADER project. These last two items have been designated in the project plan as Task 9 and Task 10 respectively.

Volume 2, *Project Management Manual,* will define the system tools and operational processes for the LEADER project management systems. The management processes and systems include topics such as:

- **Status Reports and Status Meetings**. A description of the processes and procedures to be used for status reporting. Sample forms will be included.

- **Issues Tracking System**. A database system to track and report on LEADER project issues. This tool will be used to document project issues, present the issues to the Issue Resolution Committee, and report on progress of each issue.

- **Configuration Management**. A set of procedures describing the use of configuration Management Support systems to track any project item which will change routinely (i.e., version numbers). This includes a definition of the Modification Notices and Amendments process including documentation, approval, and implementation requirements in accordance with paragraph 49 of the Base Agreement.

- **Documentation Management System.**. A database containing tracking information on all official correspondence for the project.

- **Project Meeting Standards.**. A discussion on the standards for scheduling, conducting, and documenting project meetings.

- **Quality Management Procedures.** A description of the Quality Assurance procedures for ensuring that project deliverables meet optimal quality standards.

- **Risk Management.** A consolidation of risk management topics submitted with the RFP response.

Volume *3, System Development Standards,* will build upon and extend the development approach described in Section 4, Deliverables and Approach of the Project Control Document (PCD). It will further establish the standards for defining and documenting

system requirements, system design, customer views, program coding, user

documentation, and interfaces. These standards will evolve over the life cycle of the

project and will be documented before each applicable Task.

Volume.4 - *Deliverable Standards Manual,* will define the format, content, and plan for

acceptance of each LEADER deliverable. Included will be elements dealing with each

project deliverable such as:

- Deliverable transmittal letter
- Description of the deliverable
- Approach for creation of the deliverable
- Deliverable table of contents and Description
- Distribution
- Review and Acceptance Plan

Each project deliverable has very specific deliverable requirements and will have a

section in this volume. The deliverable elements identified above will be documented

prior to commencing work on any deliverable and will be included with the appropriate

PCD updates.

Binders

The PMP will be issued in 3-inch, white, 3-ring binders labeled Volumes 1 through 4.

They will have jacket inserts that will clearly label the document. If required, additional

binders will be issued to the approved distribution list. Each binder will have a unique

serial number as part of the title page for each copy.

Acronyms and Abbreviations

Each term which has an acronym or is abbreviated is spelled out the first time it is used

within each volume. The complete word, term, or title is followed by the acronym or abbreviation in parenthesis (e.g. Project Management Procedures (PMP)). Thereafter, the acronym or abbreviation may be used exclusively.

Maintenance of the PMP

The PMP will be periodically updated to specify the details of project tasks as they are scheduled to begin (i.e. the beginning of each LEADER Task will require an update to the PCD). Each update will be introduced through a Project Management Release memorandum. The memorandum will summarize the revision, specify the revision number and provide an updated table of contents, history maintenance section, and the actual revision. The revisions will generally be available on the Project LAN and in hard copy. Version control will be maintained by the Unisys QA Team.

The PMP will include a History Maintenance section where all updates to the manual will be recorded. This section will include, for each update to the manual, the document revision number, affected section number, subject, brief description of the change, effective date, and author.

Inquires

If you have questions regarding the PMP, its purpose, version or content, contact the Unisys Project Manager.

Trademarks

All terms mentioned in this document that are, known to be trademarks or service marks have been appropriately capitalized. Use of a term in this document should not be regarded as affecting the validity of any trademark or service mark.

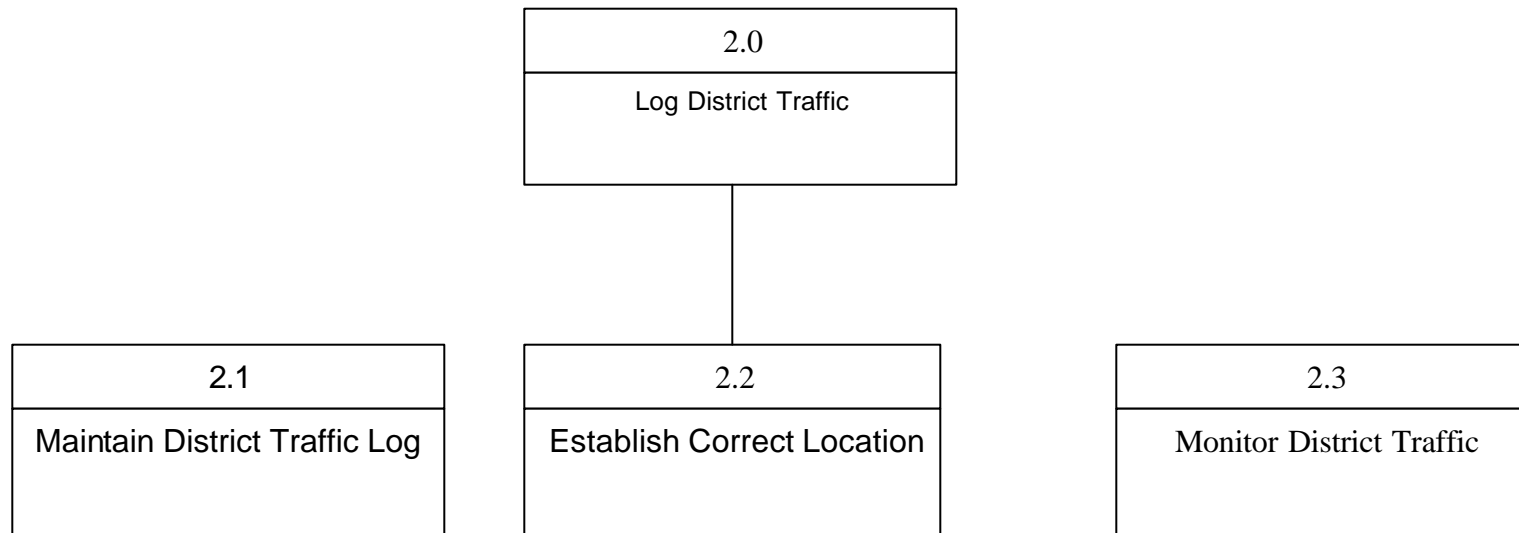The electronic copy of this deliverable will be moved to the *earth**deliverables* folder on

the LEADER project local area network upon submittal to the County for formal review.

4.10   Examples

This section provides examples of selected elements of the Task 2.2 DSM update.

4.10.1   **Example of 2.2.1.1 Functional Decomposition Diagram**

2.0
Log District Traffic

2.1		2.2		2.3
Maintain District Traffic Log		Establish Correct Location		Monitor District Traffic

2.0 Log District Traffic System Architect Mon, Apr 22, 1996 17:56
LEADER Project – FDD Version 2.1

4.10.1.1   Example of 2.2.1.1 Cross Reference Report

2.1 Process Number	2.1 Process Name	2.1 Process Text	2.2 Process Number	2.2 Process Name
2.3.1	Maintain Client List	All	LD.3.2.3	Monitor Traffic Log
2.3.2.	Send Interrupt	All	FA.3.3	Send Interrupt
2.2	Establish Correct	Determination of whether the client is in the correct district, based on the appropriate geographical parameters and if the office provides those services the client is requesting.	CU.4.6	Estalish Correct Location
2.2	Establish Correct Location	Generation of a referral if the client is in the incorrect office. Overriding of the generation of a referral is allowed.	CC.1	Generate Referral

4.10.3   Example of 2.2.1.2 Process Narrative

Process Number:

2.0

Process Name:

Log District Traffic

Process Narrative:

The purpose of this process is to provide the tools necessary to manage the volume of people in an LA County District waiting room, including recording and tracking reception contacts and servicing tenant staff that reside in the district office. Additionally, this process allows for the entry of phone contacts, mail-in applications, inter-county transfers and outstation applications.

This process allows the receptionist to ensure that the client is in the correct district office. A referral is generated if the client is determined to be in the wrong office.

This process also allows the receptionists, information workers and other District Staff to monitor the district traffic including displaying a list of all clients to be seen.

This process provides easy and quick access for the user to determine if a person has had prior contact with the Department and to access detailed individual and case information as needed to assist with the proper routing of the client. This process allows the user to carry appropriate information to the Log.

This process aids the receptionists and other district staff in providing prompt service to the Reception Room contacts. This staff has access to the District Traffic Log, which identifies for what purpose the client is in the office and whom the client is waiting to see.

**4.10.4   Example of 2.2.1.2 Physical Process
              Descriptions With Associated Screen(s)**

Process Number:

2.1

Process Name:

Maintain District Traffic Log

RPC:

   Name:

   sp_district_traffic_log

   Selection Criteria:

   First Name – Optional
   Middle Name - Optional

   Last Name - Optional
   Range Begin Date - Optional
   Range End Date - Optional
   • One of the above three data elements is mandatory.

   Disposition Status - Optional
   Purpose of Visit - Optional
   Contact Type - Optional

Process Narrative:

This process maintains the daily District Traffic Log.

This process is used to log information on an individual who makes contact with the District Office. Contacts may be by phone, mail, inter-county transfers, referrals from another district, out-stationed applications and walk-ins for both scheduled and

unscheduled appointments. Individuals who are logged include applicants, clients, tenant staff IHSS workers community representatives and VIPs.

Once the individual's contact is initially recorded, the status of the contact is updated and maintained on the Log to assist the District in monitoring the process and for statistical reporting purposes. The following are examples of the information which is recorded to document the individual's contact with the District: date of contact, time of contact, time seen by the worker, time at which the receptionist determined the individual was/could not be present any longer and a comment as to why, an indicator to alert staff to a special circumstance (e.g., hearing impaired, needs special assistance).

At the time the District Representative sees the individual, entry of the Representative's identifying number updates the Log and shows the client as seen.

If the individual declines to sign the application during the 'Register an Application' process, the Log is updated to show the application as unsigned.

The user may access the 'Register an Application' process by updating the Log to indicate that the individual is applying for assistance. This process then interfaces with the 'Initiate Application' process (3.1) to move the individual's demographic data forward to that process.

Business Logic Diagram:

    View Name:

    Log District Traffic

    Structured Business Logic:

Open Process:

Call 31.2 Validate User Security Rights Process to validate user access

Open Window
If a new log entry is requested Then
   Open log district traffic window
   Create a new log entry record
   Set Log Date to system date
   Set Log Time to system time
   Set DISPOSITION STATUS to "Unseen"
Else If an existing log entry is requested Then
   Open Log district traffic window
   Call sp_district_traffic_log
   Else
   Open Log district traffic window in inquiry Mode
   End if
End if

Main Process:

Enable Buttons
If PURPOSE OF VISIT is "Scheduled Interview" Then
  Enable " Appointment" button
End if

If INDIVIDUAL TYPE is "Client" Then
  Enable "Interrupt', 'Inquiry' buttons
End if

If DISPOSITION STATUS is "Referred" Then
       Enable REFERRED TO field
       Enable "Print referral' button
End if

<u>Appointment</u>
When 'Appointment' button is clicked
       Call 23.1 View Schedule Process
       With LAST NAME and/or CASE NUMBER
End when

If appointment record Exists Then
       Display TIME, WORKER NAME
Else
       Set PURPOSE OF VISIT To
       Display MSG: "No appointment exists"
End if

<u>Inquiry</u>
When Inquiry button is clicked
       Call Inquiry Process
End when

<u>Interrupt</u>

Print
When 'Print referral' button is clicked
        Call 14. 1 Print Referral Process to generate referral 0001
        With INDIVIDUAL NAME, OFFICE LOCATION
End when

Leaving Window
When 'O.K. button is clicked
        Perform validation checks
        Call sp_district_traffic_log to Save Data
End when

When "Cancel' button is clicked
        Close log district traffic window Witho ut Save
End when

Close Process:

If log entry record is Modified Then
        Call sp_district_traffic_log to Save Data
        If PURPOSE OF VISIT is "New Application" or Restoration" or "Reapplication" Then
        Call 2.2 Establish Correct Location Process
        End if
Else
        Close log district traffic window
End if

User Interface Validation/Edit

Element Label	Element Source	Element Destination	Protected	Mandatory	Table	Initial Value
Log Date	Dtl_Last_Name	Dtl_Last_Name	Yes	N/A	None	N/A
Log Time	Dtl_Last_Name	Dtl_Last_Name	Yes	N/A	None	N/A
Last	Dtl_Last_Name	Dtl_Last_Name	No	Yes	None	None
First	Dtl_Last_Name	Dtl_Last_Name	No	Yes	None	None
MI	Dtl_Last_Name	Dtl_Last_Name	No	No	None	None
Purpose of Visit	Dtl_Last_Name	Dtl_Last_Name	No	Yes	T_Purpose	None
Contact Type	Dtl_Last_Name	Dtl_Last_Name	No	Yes	T_Contact	Walk-In
Individual Type	Dtl_Last_Name	Dtl_Last_Name	No	Yes	T_Individual	None
Case #	Dtl_Last_Name	Dtl_Last_Name	No	Yes	None	None
Status	Dtl_Last_Name	Dtl_Last_Name	No	Yes	T_Status	Unseen
Time	Dtl_Last_Name	Dtl_Last_Name	No	No	None	None
Referred to	Dtl_Last_Name	Dtl_Last_Name	No	No	T_Rlocation	None

Element Label	Element Source	Element Destination
Sequence Number	Dtl_Sequence Number	Dtl_Sequence_Number

Audit:

Common:

Yes

Specialized:

No

Internal Interfaces:

23.1 View Schedule Process
16.3.3 Send Interrupt Process
14.1   Print Referral Process
2.2   Establish Correct Location Process

External Interfaces:

None

Notices:

None

Alerts:

None

Referrals:

Correct Office Template

Reports:

None

Processing:

Location:

Workstation

Automation Type:

Online